



**METROPOLITAN
TRANSPORTATION
COMMISSION**

Joseph P. Bort MetroCenter
101 Eighth Street
Oakland, CA 94607-4700
TEL 510.817.5700
TDD/TTY 510.817.5769
FAX 510.817.5848
E-MAIL info@mtc.ca.gov
WEB www.mtc.ca.gov

Memorandum

TO: Administration Committee

DATE: September 7, 2011

FR: Executive Director

W.I.:

RE: Contract Amendment and Contract: Public Opinion and Polling Services

- i. Contract Amendment: Corey, Canapary & Galanis, San Francisco, CA (\$125,000 contract amendment)
- ii. Contract: EMC Research, Inc., Oakland, CA (not to exceed \$150,000)

Staff recommends that this Committee authorize execution of one contract amendment and one new contract to provide public opinion and polling services for the agency, as described below. Funds for these contracts are included in FY 2011-12 agency budget.

Contract Amendment: Plan Bay Area public opinion poll and focus groups — Corey, Canapary & Galanis (\$125,000)

Corey, Canapary & Galanis is part of a panel of pre-qualified consultants, approved by this Committee in October 2010, to provide assistance on an as-needed basis with public involvement work related to Plan Bay Area. Under an existing contract for \$100,000, Corey, Canapary & Galanis planned, designed and conducted a Bay Area wide public opinion poll in April 2011 to assess attitudes, preferences, priorities and trade-offs on key regional land-use and transportation issues. A contract amendment in the amount of \$125,000 is being sought to allow the firm to plan, design and conduct a follow-up public opinion poll and focus groups this fall. The purpose of this research effort is to assess public opinion about Plan Bay Area's preferred scenarios and key regional land-use and transportation issues. The poll will test residents' attitudes, preferences, priorities and trade-offs on key issues. The focus groups provide an opportunity to further evaluate some of the Plan Bay Area preferred scenarios that are tested in the telephone poll.

Contract: Potential regional gas tax public opinion poll— EMC Research, Inc. (not to exceed \$150,000)

Background

Pursuant to California Revenue and Taxation Code (R&T Code) Section 8500, MTC may impose a gas tax not to exceed 10 cents per gallon, subject to voter approval. Prior to imposing a tax, MTC must adopt an expenditure plan and submit the proposed regional gas tax measure to the voters for approval. Under existing law, a two-thirds overall voter majority in the counties that place the measure on the ballot is needed to pass such a measure and authorize MTC to impose the tax in the region. Revenues from a regional gas tax could be directed toward:

- a) rehabilitating local streets and roads;
- b) shoring up the finances of Bay Area transit operators (in conjunction with possible future recommendations of MTC's Transit Sustainability Project);
- c) funding other projects or programs not yet identified.

To inform the consideration of a potential regional gas tax measure for the November 2012 ballot, MTC is seeking public opinion and polling services to obtain statistically valid public reaction data to potential gas tax scenarios including a customized package of questions for individual counties or subregions of the Bay Area.

Consultant Selection Process

MTC issued a Request for Proposal (RFP) for Public Opinion and Polling Services on July 20, 2011. We received five proposals that were responsive to the RFP. A three-person evaluation panel, made up of MTC staff members, was formed to review the responsive proposals. The members of the evaluation panel independently reviewed and scored the five responsive proposals against four key evaluation criteria listed in the RFP: expertise and experience; recommended approach to the project; cost effectiveness; and communication skills.

After the initial evaluation, the panel requested Best and Final Offers from the two highest-ranked proposers, asking these two proposers to outline details and costs for a poll with a desired margin of error of approximately +/-5% at the individual county level, having concluded that a margin of error greater than this at the county level would not yield statistically reliable data for a given county.

The evaluation panel received a Best and Final Offer (BAFO) from each of the short-listed firms. The evaluation panel determined that the highest-ranked BAFO was submitted by EMC Research, of Oakland, California. Both proposals scored well in all four criteria measured, but EMC Research's proposal received the highest total score. EMC's extensive experience with tax measures in the Bay Area, and its presentation of several sampling alternatives that would be effective at the county level were key distinguishing factors. While the EMC proposal was more expensive than the proposal from the other highly ranked firm – True North Research, Inc., of Encinitas, California – EMC's overall mix of qualifications, especially the firm's experience with local Bay Area ballot measures (such as Regional Measure 2), tipped the balance in their favor.

Schedule

Upon execution of the contract, MTC staff will meet with EMC Research to develop a polling strategy and timeline. Poll results should be available sometime in the early part of 2012.

Recommendation

Staff recommends that the Committee authorize the Executive Director or his designee to negotiate and enter into a contract amendment with Corey, Canapary & Galanis in an amount not to exceed \$125,000, and a contract with EMC Research, Inc. in an amount not to exceed \$150,000.

Steve Heminger

SH:JC:CA

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REQUEST FOR COMMITTEE APPROVAL

Summary of Proposed Consultant Contract Amendment

Work Item No.:	1121
Consultant:	Corey, Canapary & Galanis San Francisco, CA
Work Project Title:	Public Participation Program for the 2013 Plan Bay Area
Purpose of Project:	To assist in implementing a comprehensive public participation program for Plan Bay Area.
Brief Scope of Work:	Plan, design, and conduct a Bay Area wide public opinion poll; plan, design and conduct four focus groups.
Project Cost Not to Exceed:	\$125,000 (total contract before this amendment = \$100,000)
Fiscal Impact:	Funds are included in MTC FY 2011-12 budget.
Motion by Committee:	That the Executive Director or his designated representative is authorized to negotiate and enter into a contract amendment with Corey, Canapary & Galanis for the purposes described above and the Chief Financial Officer is authorized to set aside funds up to \$125,000 for such amendment.

Administration Committee:

Dave Cortese, Chair

Approved:

September 14, 2011

REQUEST FOR COMMITTEE APPROVAL

Summary of Proposed Consultant Contract

Work Item No.: 1517

Consultant(s): EMC Research, Inc., Oakland, CA

Work Project Title: Public Opinion and Polling Services for Potential Regional Gas Tax

Purpose of Project: To provide MTC with public opinion and polling input prior to considering a potential regional gas tax ballot measure.

Brief Scope of Work: The consultant will develop a strategic approach and schedule, design a public opinion poll with variations by county and/or subregional areas, prepare a survey instrument, conduct a pretest, conduct a statistically valid public opinion survey, prepare a comprehensive report including analysis and interpretation of survey results, and present the results to various MTC bodies.

Project Cost Not to Exceed: \$150,000

Funding Source: FTA 5303/Bridge Toll 2%

Fiscal Impact: Project is included in MTC FY 2011-12 budget

Motion by Committee: That the Executive Director or his designee is authorized to negotiate and enter into a contract with EMC Research, Inc. to provide public opinion and polling services for a potential regional gas tax in the San Francisco Bay Area, and the Chief Financial Officer is directed to set aside funds up to \$150,000 for such contract.

Administration Committee:

Dave Cortese, Chair

Approved: Date: September 14, 2011